



## State of Montana Project Management Office

### *Project Execution and Approval Phase*

## Customer Acceptance Checklist Instructions

Template for a checklist and signoff form that can be used by a customer or user reviewing a new system's functionality and other attributes before closing a purchase order or accepting a delivery. It includes checklist areas for functional tests, documentation reviews, issue recording, enhancement requests.

This form can be used stand-alone for this purpose or it can be used as the short-form checklist and signoff form accompanying a written User Acceptance Test Plan or Beta Test Plan (see our templates for those documents).

NOTE: This form can also be adapted for review and acceptance of any deliverable between a customer and a provider. Whether the deliverable is a recommendations report from consultants, a user manual from a technical publications firm, a physical hardware system, a software application, a plan for a marketing campaign, etc., this form can be used to list what's expected by the customer, record results of the acceptance review or tests, record open issues to be corrected and, ultimately, document acceptance by the customer.

Especially when purchasing expensive new systems that have just been released, customers may want to ensure that the system functions as promised before committing funds and accepting delivery. This checklist provides a way for the customer to work with the developer of the system to test key functionality, note any issues that must be corrected before the customer will accept the system and, ultimately, provide an official record of the system's acceptance.

**Create your own version(s) of this form to reflect the kinds of products or services you buy, for which a formal acceptance of the deliverable from the vendor is important.**

When preparing to accept a deliverable—system, product, report, etc.—from a supplier, do the following:

1. Fill out your version of this form to include the items you want to test and/or review.
2. For each item, consider ahead of time, if possible, whether the deliverable will be accepted with any discrepancies to that item.
3. Schedule the review/tests with the supplier and discuss expectations.
4. Perform the reviews or tests and mark the performance of each item.

5. Indicate whether each result is acceptable—will the deliverable be accepted with this issue?
6. Review overall results with supplier, timeline for issue resolution and whether re-test will be required.
7. Once the acceptance criteria have been met, sign the form along with the vendor.

## Administrative Information

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